



County Assumptions and Minimum Requirements for Support Brokers

Dane County funds support broker agencies to provide support broker services. In turn, support broker agencies hire and train the support brokers they employ. This training occurs within the support broker agency as well as through courses offered by the Waisman Center's Training and Consultation Catalog. The county requires all support brokers to undergo a criminal background check. Regardless of which agency a broker works for, core-training elements include:

- Understanding how to complete essential financial paperwork to ensure a person's individual funding flows uninterrupted.
- An overview of Dane County's Developmental Disabilities system such as that offered at "Taste of Dane County"
- Review of Dane County's Abuse and neglect policy as presented by Dane County's Community Services Consultant, Maya Fairchild.
- "Power and Control: Learning How to Use It Respectfully" offered through the Waisman Center's Training and Consultation Catalog.
- Strategies for working effectively and communicating clearly with community providers and families such as those taught in "Communication and Intentional Messages" through the Waisman Center's training catalog and broker coalition sponsored training.
- Understanding person-centered planning techniques
- Understanding financial and health care benefits such as Social Security and Medicaid
- Continuing education sponsored by the broker coalition such as the annual broker symposium and periodic county informational updates.

In addition to the above core-training elements brokers must meet minimum qualifications of the Community Integration Program (CIP) which includes:

- Skills and knowledge which would typically be acquired toward a degree in the human service field, and
- At least 2 years experience in a human service field, and
- Knowledge of services and resources in the developmental disabilities field, and
- Attend (or be exempted from) mandatory CIP Core Course training provided by the CIP staff

PEOPLE SELECTING SUPPORT BROKERS CANNOT:

- Select a broker employed by one of their current support agencies
- Hire their brokers to provide other types of support to them
- Choose their guardian or legal representative to act as their support broker

MINIMALLY BROKERS MUST:

- Be selected, hired and work under the direction of the person receiving support
- Sign a written broker agreement with the person receiving supports, outlining what the broker will do
- Develop, write, implement and revise a person-centered plan annually
- Assist a person in identifying and obtaining needed supports that can be purchased within their service rate
- Have at least monthly contact with the person receiving services or one of their team members
- Have face to face contact with the person receiving services at least every 3 months
- Assist a person in developing their own personal record keeping system or ensure that someone else in their life is doing this.
- Complete and maintain required on-going forms and records, including:
 - Case note or journal entries specifying contacts made on a person's behalf
 - Individual Financial Plan (IFP)
 - Service Agreement/Vouchers to ensure that all service providers get paid and know the parameters of the support they are paid to provide.
 - Necessary funding paperwork (annual CIP plans)
 - Monthly recording of hours spent per person (610's)

MINIMALLY, SUPPORT BROKERS MUST ASSURE THAT:

- A person receives necessary health and dental care
- A person is living in safe, decent conditions
- A person's money is being appropriately managed
- All workers are adequately trained and aware of the person's support needs
- The person is receiving adequate support to maintain health and safety
- If one or more of these conditions are not met, the broker must be actively involved in trying to assure that they are met

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